Small Business Reserve (SBR) Program Liaison Training



Presented by
Lisa Mitchell Sennaar
SBR, Compliance Manager
lisa.sennaar@maryland.gov



February 16, 2021, 9 am – 12 pm

Logistics

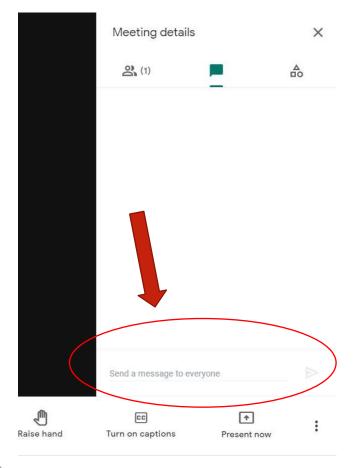
Hover your mouse over the bottom of your screen



Logistics

Please use the CHAT bar to ask questions or make comments during the training

If you need to speak, unmute your microphone and introduce yourself by name and agency prior to speaking



Logistics

If you are joining us by phone:

You must press *6 to mute and unmute your phone

AGENDA

- 1. Welcome
- 2. GOSBA Staff and Presenter Introduction
- 3. SBR Program Overview
- 4. The PRG and the new SBR Executive Order
- 5. Searching for Small Businesses
- 6. SBR Liaison Officer
- 7. In the SBR Toolkit:
 - Quarterly and Annual Reporting Template and Instructions
 - Procurement Forecast Template and Instructions
 - Strategic Business Plan Template and Instructions
 - Procurement Compliance Bulletins and Compliance Library
- 8. VSBE Update and Reporting
- 9. Announcements/Survey Reminder

WELCOME

Meet the Staff of the Governor's Office of Small, Minority & Women Business Affairs (GOSBA)

Contact Us

- Created in 2004
- Provides small businesses with the opportunity to participate as prime contractors on state contracts

§14-502

The SBR Program directs participating agencies/departments to the extent practicable to spend at least 15% of its fiscal year procurement expenditures with certified small businesses

Once a solicitation has been designated as "SBR," an award can only be made to a small business certified in the SBR Program

Certification is an online process through the vendor registration process on the state's eProcurement platform - eMaryland Marketplace Advantage (eMMA

The Procurement Review Group

...and the new SBR Executive Order

February 16, 2021

Presented by Jamie Tomaszewski & Chantal Kai-Lewis





The PRG

The Procurement Review Group (PRG) shall review proposed procurement solicitations, proposals to exercise options or otherwise modify the contract, and proposals to award sole-source contracts when the resulting contract is:

- (1) Eligible for designation to the Small Business Reserve (SBR) Program when the total value is expected to exceed \$50,000, and
- (2) For evaluation of Minority Business Enterprise (MBE) and Veteran-Owned Small Business Enterprise (VSBE) participation goals when the total value is expected to exceed \$100,000.

The PRG shall determine the appropriate socioeconomic utilization methods to encourage maximum small and/or minority and/or veteran-owned business participation in each proposed contract; and shall make recommendations to the agency head and the solicitation's procurement officer concerning specific designations and/or participation goals.

Executive Order **01.01.2021.01**Increasing Small Business Participation in State Procurement

- Issued January 6, 2021; implementation became effective February 1, 2021
- Engages the State contracting marketplace to support small businesses during this critical economic recovery period from the COVID-19 pandemic.
- Enhances the Small Business Reserve (SBR) Program by designating all procurements between \$50,000 and \$500,000 to the SBR Program, unless the procurement meets defined exemptions.

Then vs. Now

Existing Law

▶ Pursuant to SFP § 14-301.1(9), race-neutral measures shall be employed to the maximum extent practicable to drive inclusion prior to the employment of race-conscious measures

Executive Order Changes

- ► Automatic designation category between \$50,000-\$500,000
- Previously, there was no formal approval process through GOSBA regarding a unit's determination on whether or not to designate a procurement as a SBR
- SBR Liaison mandatory member of the PRG

Guidance Available

- ► To facilitate this new expanded PRG evaluation process, DGS & GOBA created several key documents, which are available on the OSP website:
 - https://procurement.maryland.gov/procurement-review-groupprg/
- The *NEW* documents include:
 - ▶ PROCUREMENT REVIEW GROUP: Guidance and Worksheets
 - ▶ **BEST PRACTICES:** <u>Small Business Reserve (SBR) Executive Order</u> <u>01.01.2021.01 Implementation Guidelines</u>
 - SBR Executive Order FAQs

Reminder

Agencies must obtain GOSBA's approval of MBE and/or Disadvantaged Business Enterprise (DBE) goals prior to issuing the solicitation for **all statewide** master contracts and procurements expected to exceed \$25 million (including sole source contracts).

To ensure that procurements will continue to be issued expeditiously, agencies must submit proposed goals to GOSBA for review at least five (5) business days prior to the anticipated solicitation date.

GOSBA shall have the right to postpone or pull back the procurement if the 5-day requirement is not met. GOSBA will complete its review within 72 business hours of receiving the proposed goal.

To Contact Us

Office of State procurement (OSP) Website

Jamie Tomaszewski

<u>jamie.tomaszewski@maryland.gov</u>

Governor's Office of Small, Minority & Women Business Affairs (GOSBA) Website

Chantal Kai-Lewis

chantal.kai-lewis@maryland.gov

Lisa Mitchell Sennaar

<u>lisa.sennaar@maryland.gov</u>

Designating a procurement for the SBR Program

Prior to designating a procurement for the SBR Program, the agency must conduct thorough market research (using multiple sources* in addition to eMMA) to assure sufficient small businesses are available

Conduct Thorough Market Research

- Utilize Google to see what small businesses in the market area provide the goods or services the agency is seeking
- If the vendor is not registered in eMMA, reach out to them and let them know about the opportunities available to them. Include the below information:
 - Maryland is Open for Business! Maryland's new eProcurement platform "eMMA" is live! <u>eMMA</u>

Conduct Thorough Market Research

Utilize other databases and resources to consider to find small businesses

Other Databases and Resources to Consider to Find Small Businesses

the State of Maryland <u>Minority Business Enterprise Program</u>
 <u>Directory</u>

ii. Veteran-Owned Small Business Enterprises list in eMaryland Marketplace Advantage (eMMA) <u>16 - eMMA QRG - Public Search for Vendors</u>

Other Databases and Resources to Consider to Find Small Businesses

iii. SBA Dynamic Small Business Search portal https://web.sba.gov/pronet/search/dsp dsbs.cfm

iv. Public Spend Forum/GovShop
https://www.publicspendforum.net/

v. The Vets First Verification Program directory https://www.va.gov/osdbu/verification/

SBR Helpdesk

For questions or concerns about a vendor's certification or to refer a vendors for assistance with certification in the Small Business Reserve Program

Contact: 410-607-9600 and ask for the SBR Helpdesk
Or you may email

Lisa Mitchell Sennaar - <u>lisa.sennaar@maryland.gov</u> or Tanita Johnson - tanita.johnson1@maryland.gov

SBR Liaison Officer

COMAR 21.11.01.06

The head of each procurement unit shall designate an employee to be the SBR liaison officer in the administration of that unit's small business reserve program

The SBR liaison officer shall be a high-level employee reporting directly to the agency head or head of the procurement unit

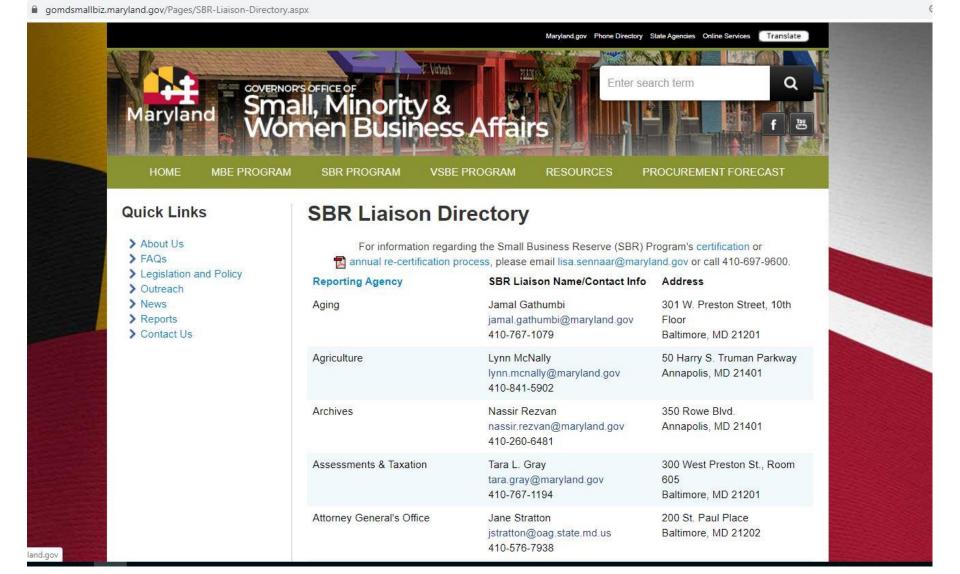
For Internal Training Purposes Only

SBR Liaison Officer Responsibilities

COMAR 21.11.01.06

- Coordinating the procurement unit's outreach efforts to the small business community
- Reviewing the unit's contracting procedures to ensure compliance with small business reserve requirements

Assisting in the resolution of small business reserve contracting issues



SBR Liaison Directory

SBR Liaison Officer Responsibilities

COMAR 21.11.01.06

 Submitting required small business reserve program reports or information

SBR Program Reporting Toolkit









In the SBR Toolkit

The SBR toolkit contains valuable information to assist State agencies/departments with the management and compliance of the SBR Program

Quarterly and Annual Reporting Template and Instructions

SBR Quarterly Reporting

SBR Quarterly Reporting instructions and template – Quarterly Report is due no later than 30 days following the quarter being reported and should contain data from the start of the fiscal year

NOTE: During this period, signatures will not be required on Quarterly Reporting

SBR Annual Reporting

The Annual Report is due within 90 days after the end of each fiscal year, in a format determined by the Governor's Office of Small, Minority & Women Business Affairs

Signatures <u>are</u> required on the Annual Report

Procurement Forecast

Each procurement unit shall, based upon the approved budget and other applicable factors, annually prepare a fiscal year procurement expenditure forecast within 60 days after enactment of the annual budget bill by the General Assembly

Procurement Forecast

This data, which includes all projected purchases of \$100,000 and above for the fiscal year, connects with the Hogan Administration's theme that "Maryland is Open for Business." Keep in mind the forecast is provided to the public and serves as an important tool for the small, minority, women, and veteran business community

Procurement Forecast

An agency only needs to turn in one Procurement Forecast that includes all projected purchases inclusive of SBR Designated procurements, and contracts that may contain MBE and VSBE goals

Procurement Forecast Portal

https://gomdsmallbiz.maryland.gov/Page s/Forecasting.aspx



Links

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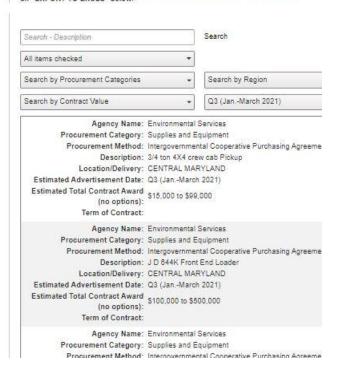
Procurement Forecast Portal

Welcome to Maryland's Procurement Forecast Portal for Fiscal Year 2021.

This database is populated with <u>projected</u> purchases of \$100,000 and above for the cryear. Not all projected purchases will be made as indicated in the Procurement Forec

We strongly advise you to connect with the buyer directly for details and updates.

To obtain the contact information of the buyer, download your search results by click on "EXPORT TO EXCEL" below.



The SBR Strategic Plan

The focus and objective of the SBR Program is to have units provide the largest number of SBR prime contracting opportunities

The SBR Strategic Plan

The SBR Strategic Plan is due on or before June 30 each year.

SBR Reporting Toolkit

The SBR Reporting Toolkit

"Using eMMA to Search for and Verify Certification Status for SBRs and VSBEs"

SBR Reporting Toolkit

GOSBA MAILBOXES For SBR Submissions

sbrwaiver.gosba@maryland.gov

Submit all SBR waivers covered under SBR Executive Order 01.01.2021.01

sbrreports.gosba@maryland.gov

Submit all SBR Program reports here (SBR Quarterly and Annual Reports)

compliance.gosba@maryland.gov

Submit all other required Reports here (Procurement Forecasts and SBR Strategic Plans



VSBE (Veteran-Owned Small Business Enterprise) Updates and Reporting

Presented By

Tanita Johnson, SBR Compliance Manager

Nichelle Johnson, MBE Compliance Manager

VSBE Program Update

The 2020 Maryland General Assembly convened a Veteran-Owned Small Business Enterprise (VSBE) Work Group to look at the existing program and make recommendations for improvements. A report, prepared by the Department of General Services, has been submitted to the governor and legislators.

VSBE Program Update

While there are no details to share at this time, we don't want you to be caught off-guard. It is our expectation that proposed policy changes will have the intention of aligning the VSBE Program to policies currently governing the MBE Program.

We will share information as it becomes available, so stay tuned.

VSBE PROGRAM (Veteran-Owned Small Business Enterprise)

- Provides contracting opportunities on state-funded procurements for qualified veteran-owned small businesses.
- Specific agencies spend at least 1% of the total dollar value of their procurement contracts either directly (prime contractors) or indirectly (subcontractors) with certified VSBE firms.

VSBE PROGRAM (Veteran-Owned Small Business Enterprise)

VSBE Businesses must:

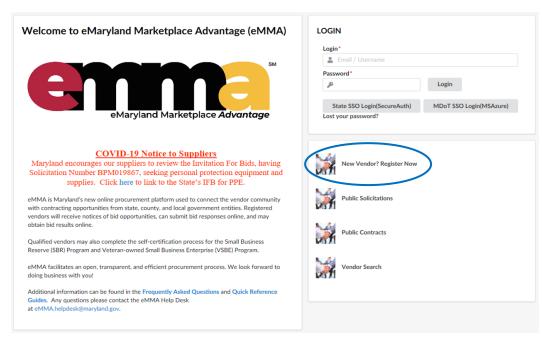
- 1) Meet size standards adopted by the <u>United States Small</u>
 <u>Business Administration in 13</u>
 <u>C.F.R. 121.201</u> and any subsequent revision of that regulation
- Be at least 51% owned and controlled by one or more individuals who are veterans

Certification within VSBE requires a vendor to:

- 1) Register within eMaryland Marketplace Advantage (eMMA)
- 2) Obtain Veteran Verification (Maryland Department of Veterans Affairs OR U.S. Department of Veterans Affairs/Vetbiz)
- 3) Submit the eMMA VSBE Application
 Covernor's Office of Small, Minority & Women Business Affairs

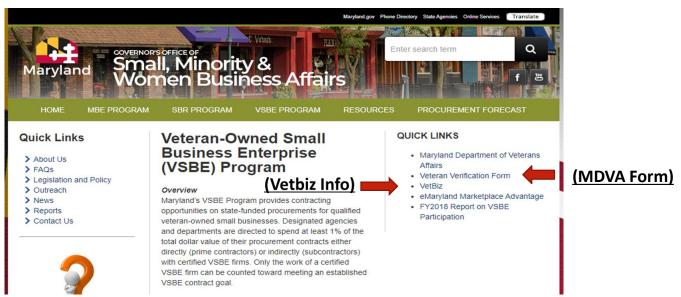
VSBE- Vendor Registration

1) Vendor must register within eMaryland Marketplace Advantage (eMMA)



2) Vendor must obtain Veteran Verification from the Maryland Department of Veterans Affairs OR U.S. Department of Veterans Affairs/Vetbiz.

Information can be found on gomdsmallbiz.maryland.gov.



MDVA Verification of Veteran Status Form

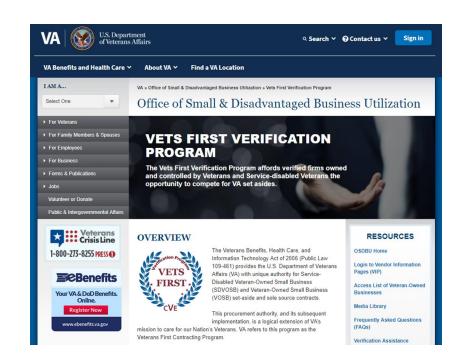
Vendor forwards this form to the MDVA to obtain Veteran verification.

	Maryland Department of Veterans Affa VERIFICATION OF VETERAN STATU	
Veteran-Owned Small Busines	Il business owner seeking veteran verification for participa ss Enterprise (VSBE) Program shall complete SECTIONS A locumentation (copy only), to the address noted at the bo	, B & C. Mail the complete
SECTION A - Veteran Info	rmation	
NAME:		
ADDRESS:		
PHONE: ()	EMAIL:	
SECTION B- Veteran Statu	is	
I,	certify the following (check the box	x that applies):
Meet the federal active	e duty requirement to be a veteran.	
Was discharged or rele service-connected disability.	eased from active duty in the US Armed Forces of the Unit	ted States and have a
SECTION C – Veteran's Sv	vorn Statement	
		-f ld-d d b
it is a true, correct statement	jury, that I have examined this certificate and to the best	or my knowledge and be
it is a dide, correct statement		
	Date:	
Veteran's Signature:		
Veteran's Signature:	Date:	<u>ie following:</u> United States Departmer
Veteran's Signature:	Date:	e following: United States Departmer ly. Do not send original.
Veteran's Signature: Name of business entity se Acceptable Documentation This section to be	Date: eking certification in Maryland's VSBE Program: Proof of veteran status requires a COPY of one of th DD214, DD215, Discharge Papers, or a copy of the l of Veterans Affairs Rating Decision. Send a copy on	ne following: United States Departmer Ny. Do not send original. Trans Affairs only.
Veteran's Signature: Name of business entity se Acceptable Documentation This section to be	Date:	ne following: United States Departmer Ny. Do not send original. Trans Affairs only.
Veteran's Signature: **Mame of business entity se **Acceptable Documentation **This section to I** I certify that the above individual veteran in accordance with the section of the s	Date: chking certification in Plaryland's VSBE Program: Proof of veteran status requires a COPY of one of the DD214, DD215, Discharge Papers, or a copy of the of Veterans Affairs Rading Decision. Send a copy on the completed by the Plaryland Department of Veter dual is a (select one): MDVA Number: th Title 38 USC.	ne following: United States Departmer Ny. Do not send original. Trans Affairs only.
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Veteran's Signature: **Name of business entity se **Acceptable Documentation **Ihis section to 1 I certify that the above individed by the veteran in accordance will bisabled veteran in accordance. Not a veteran.	Date: eking certification in Maryland's VSBE Programs: Proof of veteran status requires a COPY of one of the DD214, DD215, Discharge Papers, or a copy of the lof Veterans Affairs Rating Decision. Send a copy on the completed by the Haryland Department of Veteral and is a (select one): MDVA Number: the Title 38 USC. It is a Select one of the Code of Federal Regulations.	ue following: United States Department ly. Do not send original raus Affairs only.

If the vendor is
verified as a Veteran,
they will receive an
MDVA# (i.e.
MDVA2020-000),
which will be used as
the "VSBE
Certification#"
within their eMMA
account.

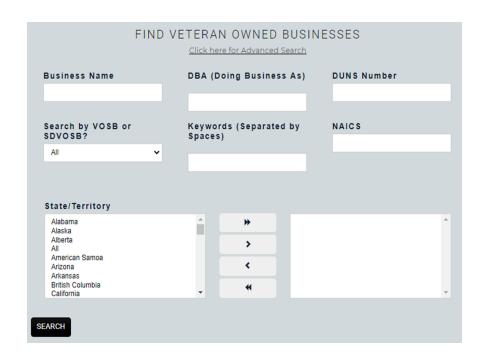
Vetbiz Information

If the vendor decides to obtain Veteran Verification from the U.S. Department of Veterans Affairs/Vetbiz, they can visit this website for information-https://www.va.gov/osdbu/verification/.



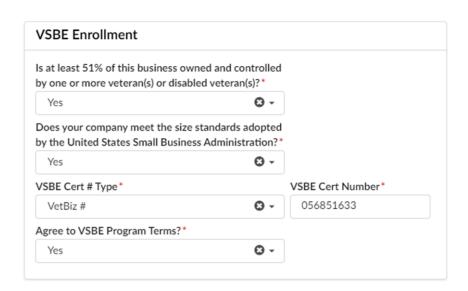
Vetbiz Information

If the vendor already has a Vetbiz account that is current/valid, in which their DUNS# is found on https://vip.vetbiz.va.gov/business-home/, this DUNS# can be used for the Veteran verification (and listed within their eMMA account as the "VSBE Certification #").



VSBE-eMMA VSBE Application

3) Vendor must submit the eMMA VSBE Application.



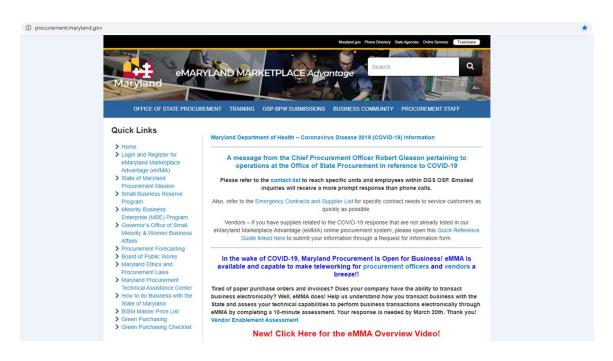
**Once the vendor has completed these 3 steps, the information will be reviewed to determine their VSBE Program certification status.

VSBE- Vendor Search For Procurement Officers/Buyers

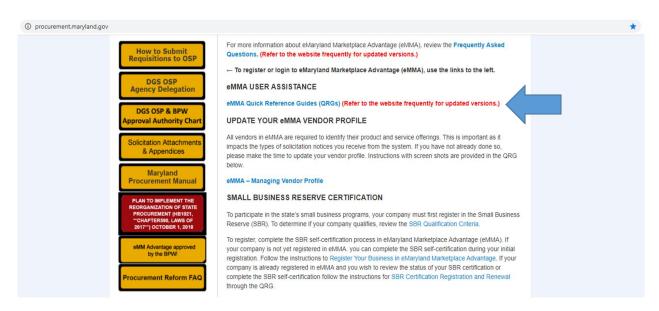
You can follow these steps to find VSBE Certified Vendors:

- 1) Visit the https://procurement.maryland.gov/ website.
- 2) Click on the "eMMA Quick Reference Guides (QRGs)" link.
- 3) Select the Buyer QRG- "Public Vendor Search for Buyers" for a guide to locate VSBE vendors.

1) Visit the https://procurement.maryland.gov/ website.



2) Click on the "eMMA Quick Reference Guides (QRGs)" link.



3) Select the Buyer QRG- "Public Vendor Search for Buyers". <u>Buyer QRGs</u>

1 - eMMA QRG General Navigation in eMMA

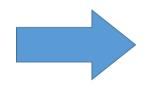
2a - eMMA QRG Creating Large Procurement IFB Sourcing Solicitations

2b - eMMA QRG Creating Large Procurement RFP Sourcing Solicitations

2c - eMMA QRG Creating Small Procurement Cat. 1 Sourcing Solicitations

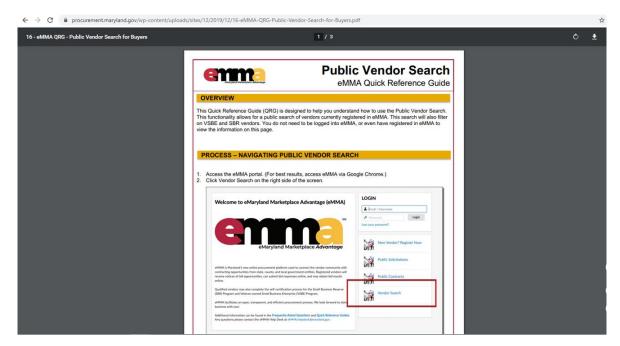
2d - eMMA QRG Creating Small Procurement Cat. 2+3 Sourcing Solicitations

2e - eMMA QRG Creating Public Posting Sourcing Solicitations (Public Notice)



16 - eMMA QRG -Public Vendor Search for Buyers

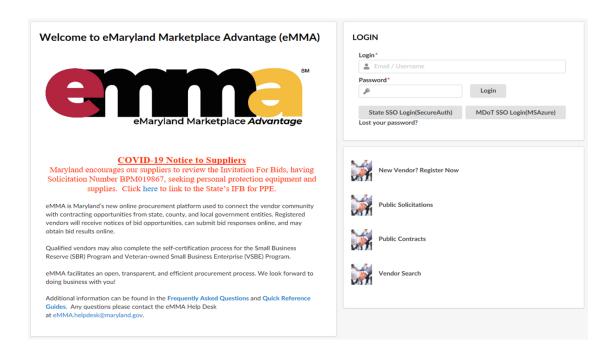
16 - eMMA QRG -Public Vendor Search for Buyers



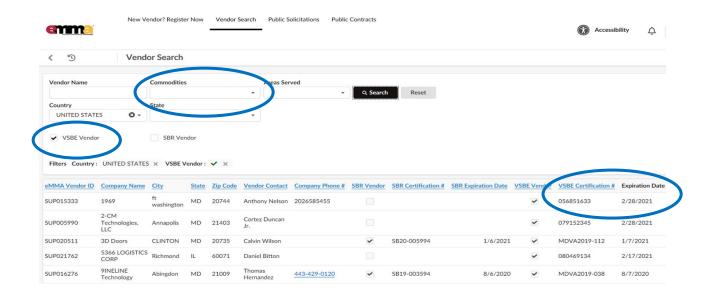
Governor's Office of Small, Minority & Women Business Affairs

Please note the following when conducting an eMMA External Vendor Search:

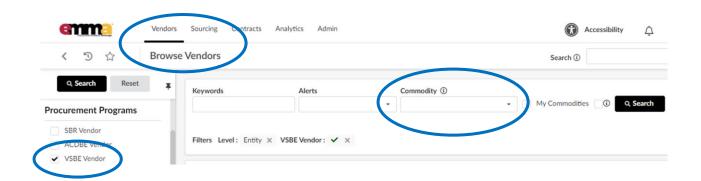
- -Be certain to review the information thoroughly (i.e. check that both the "VSBE Certification #" AND valid "Expiration Date" are listed, as these will be the certified VSBE vendors).
- -You are unable to download a spreadsheet of vendors when conducting this search. However, you can "cut and paste" the information in an Excel Spreadsheet.



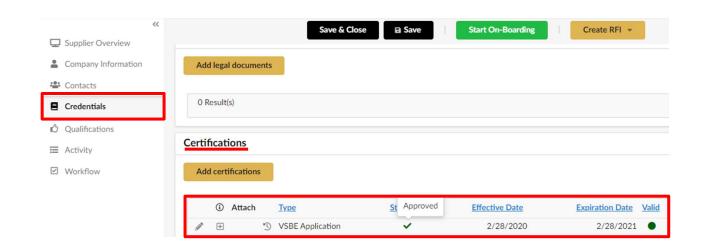
Visit the eMMA website (https://emma.maryland.gov/) to perform an External VSBE Vendor Search.



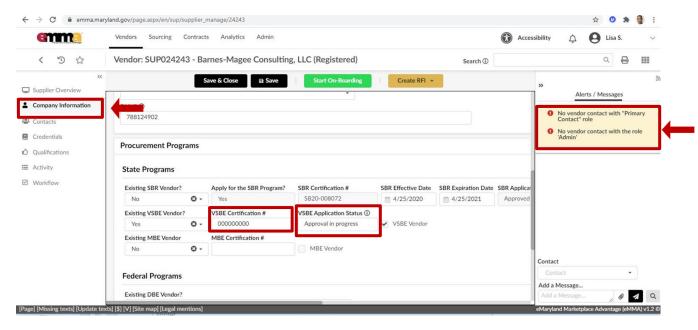
You will find the "VSBE Certification #" and "Expiration Date" listed for the VSBE certified vendors.



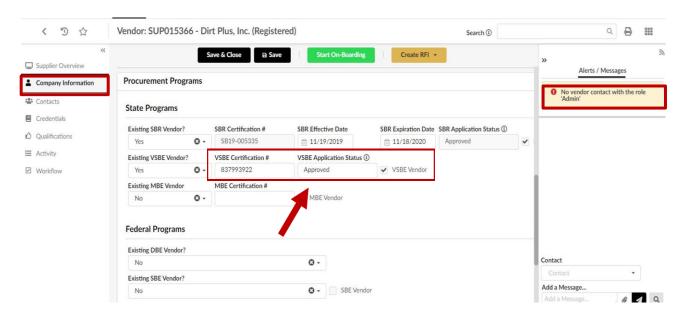
VSBE vendors can also be found by conducting an Internal Vendor Search in eMMA.



To determine the VSBE certification status, click into the "Credentials" section of the vendor's account. If the "Certifications" section has a VSBE Application with an 'Approved' Status and a valid 'Expiration Date' (i.e. date has not exceeded/certification not expired), the vendor is certified within the VSBE Program.



"VSBE Application Status" lists vendor as Approval in progress, not Approved, which is necessary for certification. Also, an invalid "VSBE Certification #" listed.

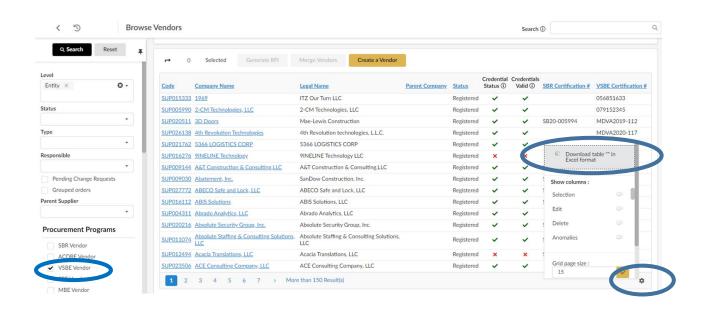


Note that the "Company Info" section of the eMMA account may list "Approved" in the "VSBE Application Status" field. However, the VSBE application may have expired. Check the "Credentials" section for verification purposes.

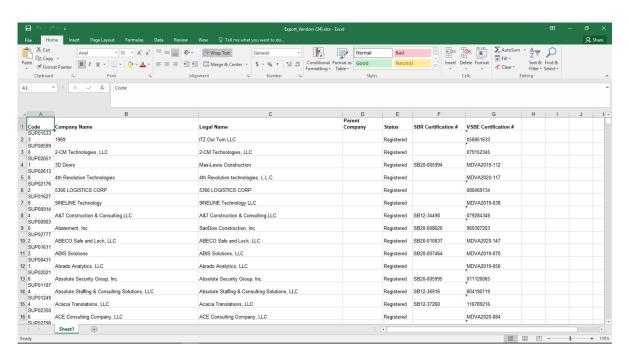
Please note the following when conducting an eMMA Internal Vendor Search:

- Be certain to review the information thoroughly (i.e. check for the 'Approved' Status AND valid "Expiration Date" within the "Credentials" section).
- You are able to download an excel spreadsheet for these vendors.
 However, you will need to check the vendor accounts to verify their VSBE certification.
- We are continuing to enhance the VSBE Vendor Database, if you have any questions, please contact our office, 4,10-6977-9600, to speak with Tanita Johnson.

VSBE- Internal Vendor Search (Excel Spreadsheet)



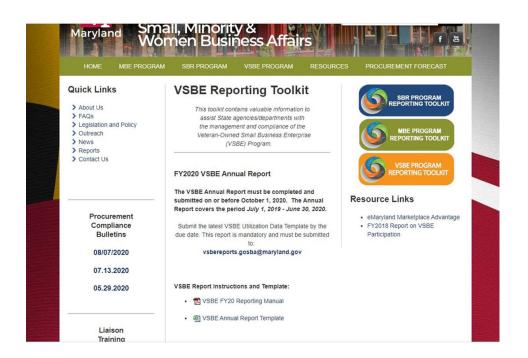
VSBE- Internal Vendor Search (Excel Spreadsheet)



VSBE Reporting Toolkit



VSBE Reporting Toolkit



VSBE Information



- VSBE Utilization Reports are due on 10/1 annually
- Regulations: COMAR 21.11.13.04 D
 - "D. Procurement agencies shall use the forms and affidavits developed by the Governor's Office of Small, Minority, and Women Business Affairs for reporting procedures required by this title."
- VSBE Schedule E: Utilization Affidavit and Participation Schedule, are online: https://procurement.maryland.gov/rfp/ and should be completed similarly to MBE forms (COMAR 21.11.13.06)
- Bidders can request a VSBE waiver, if needed.

VSBE Reporting

VSBE Program utilization data is being collected by the Governor's Office of Small, Minority & Women Business Affairs for publication to the Governor, the Letislative Policy Committee, and the public. Veteran-Owned Small Business Enterprise (VSBE) Annual Report Fiscal Year 2020 Beginning in Fiscal Year 2019, the work of firms verified by the Center For Veterans Enterprise of the United States Department of Veterans Affairs or the Maryland Department of Veterans Affairs may be counted toward a defined VSBE contract goal (see COMAR 21.11.13). INSTRUCTIONS: Complete all yellow cells. Automatic calculations will appear in blue cells. Do not edit this template. Agency Reporting: Individual Completing Report: Awards to VSBEs Total \$ Contracts Total S All Awarded to VSBEs Awarded to VSBEs Total # VSBE Total S VSBE rocurement Percentage of Contracts Procurement as Prime as Prime Subcontracts Subcontracts VSBE Awarded Contracts Awarded Contractors Contractors Awarded Awarded Participation Procurement Contracts Corporate Credit Direct Voucher Payments to VSBEs Total \$ Payments Total \$ Payments to VSBEs as Prime | VSBE Payments as to All Prime

VSBE Utilization Report

- The Annual Report Template can be downloaded from the New VSBE Reporting Toolkit: https://gomdsmallbiz.maryland.gov/Pages/Reporting-Tool-VSBE.aspx
- We also have a VSBE reporting manual available in the Toolkit
- GOSBA suggests the MBE Liaison report for the VSBE Program
- As we build out the VSBE Program, more information will be added to the Toolkit for your reference.

VSBE Reporting

- Use data from the 700 series reports from ANSWERS or internal databases to capture VSBE payments and awards (will have to change the Report type to VET in answers , where appropriate.
- At this time credit card payments cannot be tracked in ANSWERS, therefore, agencies will have to track these payments manually.
- Total All Procurements column on the Annual Report Template should be identical to the Total All Procurements total for MBE Reporting.
- As with MBE reporting, if a contract has a VSBE Prime and Sub, do not double count. The Prime Contractor total award should be listed; do not report the VSBE Subcontractor awards and payments on these contracts.

Any Questions?

VSBE Reporting- Nichelle Johnson Nichelle.johnson 1@maryland.gov

VSBE Certification- Tanita Johnson <u>Tanita.johnson1@maryland.gov</u>



Upcoming

GOSBA Bi-Monthly Compliance Call – March 11, 2021 You may register in the SBR Toolkit



If you have any SBR Program questions, please contact me:

Lisa Mitchell Sennaar

lisa.sennaar@maryland.gov

410-508-8089

THANK YOU

Please remember to complete the survey for today's training that is contained in the chat box and in the google meet invite.

https://www.surveymonkey.com/r/RMF832J